

Clerk & Recorder/Surveyor

Department Overview

The Clerk & Recorder is an Elected Official serving a four year term. The position was consolidated with the County Surveyor so the elected position is officially the County Clerk & Recorder / Surveyor. The Department is a part of the General Fund with a major portion of funding for the department coming from Fees collected as allowed by state law.

The Clerk & Recorder is responsible for two activities.

- Election activities dealing with all state, county, municipal, special district and special elections in the County;
- Document Recording and Indexing entails the maintenance of public records pertinent to lands and vital records;

In FY 2011 the Clerk & Recorder requested the Accounting activity be transferred to the County Commission. This transfer was approved to promote a more efficient and effective finance function. Accounting is included in the Finance Department for FY 2011

In addition, the Clerk & Recorder is the Clerk to the Board of County Commissioners.

The Surveyor portion of the Clerk & Recorder's job does not include staff positions. A stipend for the Surveyor duties is included in the Clerk & Recorder's salary.

The Clerk & Recorder acts as the County Election Administrator. State Law was amended to allow for additional compensation to be paid for Clerk & Recorder's who act as the Election Administrator.

Records Preservation is a separate fund established by state law, with revenue generated by a fee charged for documents filed with the Clerk & Recorder. This fund is an integral part of the Clerk & Recorder's ability to maintain and protect the important documents on file within the office. Without this funding source the ability to update records storage capabilities with new technologies would be hindered. The fund will transfer the cost of ¾ of one employee to maintain staff in the records activity.

Department Goals

- See Activity pages for specific goals

Recent Accomplishments

See Activity pages for specific goals

GENERAL GOVERNMENT

Clerk & Recorder/Surveyor

Department Budget

Object of Expenditure	Actual FY 2009	Final FY 2010	Actual FY 2010	Request FY 2011	Preliminary FY 2011	Final FY 2011
Personnel	\$ 870,609	\$ 662,588	\$ 672,462	\$ 662,928	\$ 676,949	\$ 677,022
Operations	342,284	513,594	376,378	481,476	482,775	479,414
Debt Service	-	-	-	-	-	-
Capital Outlay	312,314	678,672	258,600	699,954	714,954	719,868
Transfers Out	32,590	32,590	32,590	32,590	32,590	32,590
Total	<u>\$ 1,557,797</u>	<u>\$ 1,887,444</u>	<u>\$ 1,340,030</u>	<u>\$ 1,876,948</u>	<u>\$ 1,907,268</u>	<u>\$ 1,908,894</u>

Budget by Fund Group

General Fund	\$ 1,250,640	\$ 1,044,096	\$ 1,030,440	\$ 976,043	\$ 1,006,363	\$ 1,006,436
Special Revenue Funds	274,567	843,348	309,590	900,905	900,905	902,458
Debt Service Funds	-	-	-	-	-	-
Capital Project Funds	-	-	-	-	-	-
Enterprise Funds	-	-	-	-	-	-
Internal Service Funds	-	-	-	-	-	-
Trust & Agency Funds	-	-	-	-	-	-
Total	<u>\$ 1,525,207</u>	<u>\$ 1,887,444</u>	<u>\$ 1,340,030</u>	<u>\$ 1,876,948</u>	<u>\$ 1,907,268</u>	<u>\$ 1,908,894</u>

Funding Sources

Tax Revenues	\$ 95,019	\$ 201,425	\$ 213,778	\$ 140,889	\$ 184,451	\$ 201,328
Non-Tax Revenues	1,134,320	896,778	938,512	931,836	949,197	937,833
Cash Reappropriated	295,869	789,241	187,740	804,223	773,620	769,733
Total	<u>\$ 1,525,207</u>	<u>\$ 1,887,444</u>	<u>\$ 1,340,030</u>	<u>\$ 1,876,948</u>	<u>\$ 1,907,268</u>	<u>\$ 1,908,894</u>

Department Personnel

No. of Positions	FT/PT	Title	FTE
See individual Activity			
Total Program			0

Clerk & Recorder - Elections

Activity Overview

The Gallatin County Election Office is part of the Clerk and Recorder's Office in the General Fund, and is under the supervision of the Clerk & Recorder/ Surveyor. The Office does not generate a significant amount of non-tax revenue.

The Election Office is responsible for elections held within the county. The staff maintains the voter registration database and election management software, and holds elections required by federal, state, and county government. The voter registration database is Gallatin County's portion of the statewide database known as Montana Votes. The office also conducts elections for the Cities and Towns of Belgrade, Bozeman, Manhattan, Three Forks, and West Yellowstone, and various special districts including fire, water/sewer, and resort districts. In addition, the office provides election materials to the various school districts to assist them in performing their election duties.

Federal Laws regulating functions of the office include the National Voter Registration Act (NVRA) and the Help America Vote Act (HAVA). HAVA has been cited as the most significant election reform of federal election law since the Voting Rights Act of 1965.

The Clerk & Recorder acts as the County Election Administrator. State Law was amended to allow for additional compensation paid to those Clerk & Recorder's who act as the Election Administrator. The County approved payment of this stipend effective in October of 2005.

Activity Goals

Successfully complete elections for:

- 13 Water & Sewer Districts,
- 1 Resort District,
- 14 Rural Fire Districts,
- 16 School Districts,
- the 2011 Federal General,
- and any special elections that may arise
- As a result of new legislation, we conducted our first audit recount of the 2011 Federal Primary.
- Continue to improve Polling Place Accessibility.
- Continue to increase the number of voters who vote by mail.

Recent Accomplishments

- Conducted all five 2010 Municipal Elections by mail ballot.
- Reduced the number of voting precincts from 46 to 38.
- Moved all Bozeman polling places to the Fairgrounds, Bobcat Stadium, and the Hope Lutheran Church.
- Obtained a non-profit mailing permit which makes mailing ballots less costly.
- Completed 9 special district elections.
- Mailed approximately 16,000 confirmation notices to permanent absentee voters.
- Purchased 2nd ballot counter to provide redundancy in counting equipment
- Redesigned the election judge training and management process
- Trained approximately 300 election judges.

GENERAL GOVERNMENT

Clerk & Recorder - Elections

Activity Budget

Object of Expenditure	Actual FY 2009	Final FY 2010	Actual FY 2010	Request FY 2011	Preliminary FY 2011	Final FY 2011
Personnel	\$ 173,782	\$ 148,310	\$ 173,782	\$ 148,650	\$ 151,439	\$ 151,488
Operations	222,171	256,825	222,171	223,284	222,166	222,166
Debt Service	-	-	-	-	-	-
Capital Outlay	64,600	32,000	64,600	-	15,000	15,000
Transfers Out	-	-	-	-	-	-
Total	\$ 460,553	\$ 437,135	\$ 460,553	\$ 371,934	\$ 388,605	\$ 388,654

Budget by Fund Group

General Fund	\$ 460,553	\$ 437,135	\$ 460,553	\$ 371,934	\$ 388,605	\$ 388,654
Special Revenue Funds	-	-	-	-	-	-
Debt Service Funds	-	-	-	-	-	-
Capital Project Funds	-	-	-	-	-	-
Enterprise Funds	-	-	-	-	-	-
Internal Service Funds	-	-	-	-	-	-
Trust & Agency Funds	-	-	-	-	-	-
Total	\$ 460,553	\$ 437,135	\$ 460,553	\$ 371,934	\$ 388,605	\$ 388,654

Funding Sources

Tax Revenues	\$ 135,626	\$ 215,049	\$ 226,569	\$ 181,416	\$ 190,467	\$ 207,894
Non-Tax Revenues	166,679	169,857	178,957	152,273	176,747	165,176
Cash Reappropriated	158,247	52,229	55,027	38,245	21,391	15,584
Total	\$ 460,553	\$ 437,135	\$ 460,553	\$ 371,934	\$ 388,605	\$ 388,654

Activity Personnel

No. of Positions	FT/PT	Title	FTE
3	Full-Time	Support Staff	3
3		Total Program	3

Clerk & Recorder - Elections

2011 Budget Highlights

Personnel

- No change

Operations

- Reduction for change in polling locations and precincts result in a minimum of \$15,000 reduction in costs. In addition reductions occurred for a decrease in fixed costs.

Capital

- Contingency for ADA efforts at polling places and to prepare for state passing cost down to county.

County Commission Goals/Department Response

The County Commission established a set of overarching goals for the county government. Listed below are the County Commission's goals, followed by the methods by which the Clerk & Recorder - Election department is striving to fulfill those goals.

Exceptional Customer Service

- Accurate Election information easily accessible to the public.
- Respond to inquiries in a customer friendly manner.

Be Model for Excellence in Government

- Timely response to election queries.
- Retain the integrity of the election process

Improve Communications

- Interdepartmental Communication.
- Improve access to public information (information on website and media blitz)

To be the Employer of Choice

- A pleasant, respectful work environment.
- Retain current staff.

GENERAL GOVERNMENT

Clerk & Recorder - Elections

WORKLOAD INDICATORS / PERFORMANCE MEASURES

Workload Indicators		Actual	Actual	Estimate	Projected
Indicator		FY 2008	FY 2009	FY 2010	FY 2011
1.	Number of voter applications processed	12,000	16,588	16,000	16000_
2.	Number of confirmation cards issued to voters	17,000	16,588	27235	20000
3.	Trained election judges	325	0	300	0
4.	Number of ballots mailed	83,589	48,520	68,000	65000
5.	Number of signatures verified	39,808	34,202	42,000	45000
6.	Conduct successful elections	14	10	12	10

Performance Measures		Actual	Actual	Estimate	Projected
FY 2008		FY 2009	FY 2010	FY 2011	FY 2010
1.	% of voter registration applications processed within 60 days	100%	100%	100%	100%
2.	% of confirmation cards mailed weekly	100%	100%	100%	1000%
3.	Results complied from election judge post election survey	100%	0%	0%	0%
4.	% of Absentee ballots mailed by required deadline	100%	100%	100%	100%
5.	% of Mail ballots mailed by required deadline	100%	100%	100%	100%
6.	-Meet certification deadline	100%	100%	100%	100%
	-Meet notification deadline	100%	100%	100%	100%
	-Meet counting/canvas deadline	100%	100%	100%	100%

Comments

Clerk & Recorder - Records

Activity Overview

By Montana Law, the Recording Activity within the Clerk & Recorder's Office is responsible for the recording, indexing, safe keeping of land, county and birth / death documents. The activity also is responsible for the recording and maintenance of minutes for the County Commission.

Fees collected by the Clerk and Recorders' - Recording Activity generate a net income to the County General Fund and the Records Preservation Fund, as shown in the budget information on the next page. These revenues offset some of the costs associated with the other Clerk & Recorder activity (Elections).

The Records Department is a high traffic department that is greatly influenced by growth in Gallatin County. The first priority is to help the public find the records that they need. It is the goal to do this in an efficient manner that relies on technology and knowledgeable, helpful staff. The time that it takes to process documents is also a key to good service in the Recording Department. Records need to be accurate and as up to date as possible.

Records are currently in several different formats, including paper, microfilm and digital images. The Department is in the process of converting the older formats into the newer and more convenient and accessible digital format. This is a long-term project that will take years to complete.

Another duty of the Clerk & Recorder's Office is to provide certified searches of the records. Commonly, these include Uniform Commercial Code filings, Liens and other various real estate documents.

Other types of documents that the Clerk & Recorder maintains are the supporting documentation of the County Commission actions. This includes Resolutions, Ordinances and Contracts that must be indexed and copied and distributed accurately.

Activity Goals

- Maintain under a two-week turn-around time for returning documents to customers.
- Improve public access to records through electronic media (website, road petition database and vitals database).
- Assist customers in finding requested records in an efficient and helpful manner.

Recent Accomplishments

- Maintained less than two-week turn-around time for returning documents 100% of the time.
- Continued public access to certain records through electronic media.
- Mailed approximately 4,050 tax notices to RID Maintenance owners.
- Continued monthly staff meetings to improve departmental communication.
- Entered 4000 historical documents in EagleRecorder from 1989.
- Reviewed 40 surveys and documents showing a division of land that had no review through Planning.
- Create all new Precinct map in GIS.
- Provided EagleWeb access to Real Estate records for the public via our website.
- Provided EagleWeb access with images to our subscription customers via our website for Real Estate records from EagleRecorder.
- Reported on protests for 4 zoning districts, 1 RID and 4 LWQD annexations. Requires examining nearly 1000 protest forms.

GENERAL GOVERNMENT

Clerk & Recorder - Records

Activity Budget

Object of Expenditure	Actual FY 2009	Final FY 2010	Actual FY 2010	Request FY 2011	Preliminary FY 2011	Final FY 2011
Personnel	\$ 510,948	\$ 514,278	\$ 498,680	\$ 514,278	\$ 525,510	\$ 525,534
Operations	63,799	92,683	71,207	89,831	92,248	92,248
Debt Service	-	-	-	-	-	-
Capital Outlay	-	-	-	-	-	-
Transfers Out	-	-	-	-	-	-
Total	\$ 574,747	\$ 606,961	\$ 569,887	\$ 604,109	\$ 617,758	\$ 617,782

Budget by Fund Group

General Fund	\$ 574,747	\$ 606,961	\$ 569,887	\$ 604,109	\$ 617,758	\$ 617,782
Special Revenue Funds	-	-	-	-	-	-
Debt Service Funds	-	-	-	-	-	-
Capital Project Funds	-	-	-	-	-	-
Enterprise Funds	-	-	-	-	-	-
Internal Service Funds	-	-	-	-	-	-
Trust & Agency Funds	-	-	-	-	-	-
Total	\$ 574,747	\$ 606,961	\$ 569,887	\$ 604,109	\$ 617,758	\$ 617,782

Funding Sources

Tax Revenues	\$ (51,642)	\$ (13,623)	\$ (12,791)	\$ (40,527)	\$ (6,016)	\$ (6,566)
Non-Tax Revenues	708,459	603,921	625,695	631,562	624,449	624,657
Cash Reappropriated	(82,070)	16,664	(43,017)	13,074	(675)	(309)
Total	\$ 574,747	\$ 606,961	\$ 569,887	\$ 604,109	\$ 617,758	\$ 617,782

Activity Personnel

No. of Positions	FT/PT	Title	FTE
1	Full-Time	Elected Clerk & Recorder/Supervisor	1
1	Full-Time	Recording Supervisor	1
1	Full-Time	GIS Technician	1
7	Full-Time	Support Staff	7
1	Full-Time	Support Staff	.75
11.00		Total Program	10.75

Clerk & Recorder - Records

2011 Budget Highlights

Personnel

- Receive funding for three quarter time employee from Record Preservation budget.

Operations

- Operations reduced for decrease in Fixed costs.

Capital

- No capital requests from General Fund – see Records Preservation Fund for approved capital.

County Commission Goals/Department Response

The County Commission established a set of overarching goals for the county government. Listed below are the County Commission's goals, followed by the methods by which the Clerk & Recorder Records department is striving to fulfill those goals.

Exceptional Customer Service

- Knowledgeable, friendly, helpful staff.

Be Model for Excellence in Government

- Clear, consistent, accurate, accessible records using the best technology available.
- Accurately account for all revenue.

Improve Communications

- Internal Department communication.
- Communication with the public.
- Meet statutory requirements related to the recording of documents.
- Prepare long-term growth plan for the department.

To be the Employer of Choice

- Staff has training opportunities available to them.

GENERAL GOVERNMENT

Clerk & Recorder - Records

WORKLOAD INDICATORS / PERFORMANCE MEASURES

Workload Indicators		Actual	Actual	Estimate	Projected
Indicator		FY 2008	FY 2009	FY 2010	FY 2011
1.	Documents filed/recorded	30,178	26,562	29,675	29,000
2.	Deeds recorded	4,463	3,222	4,223	4000
3.	Plats/surveys filed	218	126	165	150
4.	New Condominium declarations recorded	56	30	13	15
5.	Total receipts	19,223	18,339	23,163	22,000
6.	Number of certified birth certificates issued	3,729	3,780	3,444	3,400
7.	Number of certified death certificates issued	4,307	4,465	4,718	4,500
8.	Minutes completed for County Commission meetings	90	68	60	60

Performance Measures		Actual	Actual	Estimate	Projected
		FY 2008	FY 2009	FY 2010	FY 2011
1.	Process documents within 2 weeks of receipt	83%	100%	100%	100%
2.	% receipts completed without voids	N/A	99.4%	99.6%	99.7%
3.	Birth Certificates issued same day as request	100%	100%	100%	100%
4.	Death Certificates issued same day as request	100%	100%	100%	100%
5.	Commission minutes posted on website within 4 weeks	92%	79%	74%	90%

Comments

Clerk & Recorder – Records Preservation

Activity Overview

The Records Preservation Fund tracks revenues generated from a fee approved by the legislature for the Clerk and Recorder to maintain and preserve the records on file in the office.

The budget for the Records Preservation Fund has revenues that are reported and segregated in a separate fund. This fund allows the County to keep county records in a proper and professional manner. Expenses in this fund assist the Clerk and Recorder in preservation of records and provide services to customers by:

- Replacement of computers;
- Purchase new document management software;
- Maintenance of equipment;
- Conversion of microfilm to digital format;
- Conversion of digital files to microfilm.
- Repair and preservation of historical paper records; and,
- Set aside funds for future records needs (shelving, cabinets, updates, equipment, off-site records storage.)

The Records Preservation Fund is used for operating and capital expenses.

Activity Goals

- Improve public access to records through electronic media (website, road petition database and vitals database).
- Convert remaining microfilmed records to digital images for use with the EagleRecorder system.
- Preserve birth and death records by placing them in clear non-reactive envelopes and storing them in binders.
- Preserve existing paper records for future use by the public.

Recent Accomplishments

- Received significant revenues for the Records Preservation Fund.
- Converted existing microfilmed records to digital images for use with EagleRecorder. Have completed all images back to 1981.
- Converted digital images to microfilm for archival purposes of those documents recorded in the fiscal year.
- Preserve 6200 birth and death records by placing them in clear non-reactive envelopes and storing them in 32 custom binders.
- Complete remodel of offsite storage facility for plats and films in the Courthouse Annex building.
- Purchase fireproof file cabinets for storage of original security microfilm.
- Maintained EagleRecorder, Tyler Content Manager, and ESRI ArcGIS software.
- Maintained Xerox large format scanner/printer system.
- Scanned 86 historic Deed Books.
- Scanned 73 historic Mortgage books.
- Scanned 15 historic miscellaneous books.
- Scanned 22 historic Decree books.
- Scanned 6 historic Mining Claim books.
- Scanned Water Rights Book.

GENERAL GOVERNMENT

Clerk & Recorder – Records Preservation

Activity Budget

Object of Expenditure	Actual FY 2009	Final FY 2010	Actual FY 2010	Request FY 2011	Preliminary FY 2011	Final FY 2011
Personnel	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Operations	30,353	164,086	83,000	168,361	168,361	165,000
Debt Service	-	-	-	-	-	-
Capital Outlay	244,214	646,672	194,000	699,954	699,954	704,868
Transfers Out	-	32,590	32,590	32,590	32,590	32,590
Total	\$ 274,567	\$ 843,348	\$ 309,590	\$ 900,905	\$ 900,905	\$ 902,458

Budget by Fund Group

General Fund	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Special Revenue Funds	274,567	843,348	309,590	900,905	900,905	902,458
Debt Service Funds	-	-	-	-	-	-
Capital Project Funds	-	-	-	-	-	-
Enterprise Funds	-	-	-	-	-	-
Internal Service Funds	-	-	-	-	-	-
Trust & Agency Funds	-	-	-	-	-	-
Total	\$ 274,567	\$ 843,348	\$ 309,590	\$ 900,905	\$ 900,905	\$ 902,458

Funding Sources

Tax Revenues	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Non-Tax Revenues	148,735	123,000	133,860	148,001	148,001	148,000
Cash Reappropriated	125,832	720,348	175,730	752,904	752,904	754,458
Total	\$ 274,567	\$ 843,348	\$ 309,590	\$ 900,905	\$ 900,905	\$ 902,458

Activity Personnel

No. of Positions	FT/PT	Title	FTE
Staff is not funded in this activity			
Total Program			0

Clerk & Recorder – Records Preservation

2011 Budget Highlights

Personnel

- No personnel in the Record Preservation budget – ¾ funded FTE funded from transfer to County General Fund. (\$38,905 for FY 2011)

Operations

- Birth and Death record preservation project.
- Maintenance for all software products and equipment used in the office.
- Microfilm to digital and digital to microfilm conversion of images.
- Transfer for ¾ Clerk & Recorder support position

Capital

- Mobile Storage \$40,000, Computers \$20,000, Generator \$140,000, Eagle Licenses \$11,360, Computer Reserve \$23,755, Sound Mixer \$3,000, Copiers \$15,000, Reserve for records needs \$470,594.

County Commission Goals/Department Response

The County Commission established a set of overarching goals for the county government. Listed below are the County Commission's goals, followed by the methods by which the Clerk & Recorder Records department is striving to fulfill those goals.

Exceptional Customer Service

- Knowledgeable, friendly, helpful staff.
- Accessibility of land information.

Be Model for Excellence in Government

- Clear, consistent, accurate, accessible records using the best technology available.
- Accurately account for all revenue.

Improve Communications

- Internal Department communication.
- Communication with the public.
- Meet statutory requirements related to the recording of documents.
- Prepare long-term growth plan for the department.

To be the Employer of Choice

- Staff has training opportunities available to them.

GENERAL GOVERNMENT

Clerk & Recorder – Records Preservation

WORKLOAD INDICATORS / PERFORMANCE MEASURES

Workload Indicators		Actual FY 2008	Actual FY 2009	Estimate FY 2010	Projected FY 2011
Indicator					
1.	Record preservation revenue collected	\$182,343	\$157,492	\$147,000	\$147,000
2.	Converted digital records to microfilm	129,865	124,524	120,000	120,000
3.	Converted microfilm records to digital format	81,000	15,000	27,000	35,000
5.	Archive and bind Birth and Death Certificates	n/a	n/a	6,200	6,200

Performance Measures		Actual FY 2008	Actual FY 2009	Estimate FY 2010	Projected FY 2011
Measure					
1.	Purchased all computers budgeted for on schedule	6	5	1	4
2.	Loaded & proofed converted historic digital images	0%	50%	100%	100%
3.	Purchased binders and bind historic birth and death cfts	N/A	N/A	33%	67%

Comments